Sunrise Movement's Hub Finance System Guide

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If you have any questions, please contact Vianni, the Movement Operations Lead, via slack (@Vianni) or email (vianni@sunrisemovement.org)

Also please share your questions and/or concerns here by commenting.
If you would like to provide an anonymous feedback survey, here is the link: https://forms.gle/ULn7wRcTyhEw3veS7.

Overview of the System

Welcome and thanks for joining us to help create our movement's national hub finance system! Finance isn't the sexiest part of fighting fossil fuel billionaires and stopping the climate crisis, but will allow us to dramatically increase the power of our movement, and enable hubs around the country to raise and spend the grassroots dollars we need to win.

Context

Within the past few years, Sunrise has undergone significant growth that has manifested most tangibly in the increased number of hubs and members. With powerful mobilizations such as the sit-ins at Nancy Pelosi’s and Mitch McConell’s offices, we have welcomed into the movement thousands of young people across diverse backgrounds.

Much of this growth, however, has been external, and although the internal-facing aspects of the movement have grown as well, the ever-increasing external demands and interests have simply outpaced the growth of internal capacities. Many hub members know from experience that this significant gap has been a source of growing pains for many involved, and much of the responsibility of managing this newfound interest has been placed on you, the individual local hub members.

As a movement that is fighting for a sustainable future for all, we must first work to be a sustainable movement in which growth does not depend solely on the dedication, passion and sacrifice of many young individuals. Being a sustainable movement means promoting the sustainable well-being of those involved, and there is much that can be done to support everyone here; therefore, we find ourselves faced with a question: Where should we begin?

Purpose, Aims & Vision

The purpose of this hub finance system is to provide a stable foundation upon which fellow young people will be able to stand up and fight for a more sustainable future. The fuel driving the movement has and always will be the passion, dedication and hope of young people throughout our communities; however, in order to change the status quo, we must first survive and exist within the system, and the realities are that money and funds are necessary to operate and support people. For the movement to continue growing in a sustainable manner, we must help people to make the most of their limited time, energy and resources. We see this system as

one of many steps towards providing the necessary support behind-the-scenes in order to free up more time and energy of young people towards story sharing, community organizing and movement building.

Overview

With this in mind, our aim is to create a simple and clear system that, while functional and compliant, is easy to use for hub members organizing on the ground. As the movement grows and further develops, the finance system will naturally adapt and grow with it, but right now, the first steps consist of the following items:

1. **Receive funding by**:
    a. Fundraising through **Act Blue** (C4 funds only)
    b. Having your hub become **dues paying members** (C4 funds only)
    c. Requesting funding through the **Hub Materials Project**
2. Simple way of **Spending**: **True Link Debit Cards**
3. Simple way of **Tracking** expenses and receipts: **In-house Reporting System**

In an overview, that is the system: a very straightforward design to take the burden of organizing and experimenting with various ways to raise and use money off the hub members.

Compliance with the necessary requirements and standards, particularly in regard to 501(c)(3) and 501(c)(4) debit card spending, requires ongoing maintenance and reporting.

Getting Started

Apply!

Hubs who want to use the Hub Finance System will fill out the Hub Finance System Application. Once complete, National will order the TrueLink debit card and may reach out to schedule a 1:1 training. Hubs can create their ActBlue page (instructions below) if they are requesting a C4 card.

If you need access to your funds soon (if you have an upcoming event or a deadline to make purchases), please indicate on the application. Cards will typically arrive within two weeks, unless expedited to 3-4 days. If you don't receive your card within three weeks, please contact Vianni via Slack or at vianni@sunrisemovement.org.

Hub treasurers will be added to the Hub Finance Slack channel once the application is complete and will be informed of support they have access to with national and other hub treasurers.

Use Your Debit Card!

The True Link Debit Card will be the way in which hub coordinators and treasurers will be able to utilize the funds that your hub raised through ActBlue and other means (see Fundraising section below for more information on this).

Activate TrueLink Card: Once you receive the card in the mail, you will need to call the phone number listed to activate your card. This process, in accordance with the Patriot Act, will require you to share your Social Security Number for identification purposes, but True Link has confirmed clearly that it will NOT record nor store any SSN information. It will also NOT look up or affect your personal credit scores or finances since this is simply a reloadable debit card.

Once these initial steps are completed and your card is activated, contact Vianni via slack (@Vianni) or email (vianni@sunrisemovement.org). The cards are not automatically linked to your ActBlue account so any deposits must be manually made. You are able to use the card!

As long as members remain responsible, following the guidelines established here and in the signed agreement, there will be continued access to the card; however, if members breach the established use of the card, access will be revoked until further review by both the local hubs and national.

This card is a tool that we hope will help hubs think less about finances and more about organizing and growing. If at any point, you have any problem with the card, please reach out to Vianni via slack (@Vianni) or email (vianni@sunrisemovement.org).

Compliance

(What We Can & Can't Spend $$$ On)

Because Sunrise is a Internal Revenue Code section 501(c)(4) nonprofit organization, there are restrictions on what you may and may not legally spend $$$ on.

Please view this document for detailed examples of restrictions around election spending. ***Do not spend on activities that are in support of or opposition to a candidate, party, or campaign.***

If you also have a 501c3 card, please view this document. The guidelines for a C3 card are slightly stricter than C4 spending.

And here is a FAQ doc on how to pay contractors, use Venmo, and do mutual aid <<< !

You may TOTALLY spend money on:

- Hub Building/Mobilization Planning (Activity that supports your day-to-day operations or Mobilization planning- renting office space, transportation, food, supplies, printing fees, building a website, graphic design, etc.)
    - *Note: If any mobilization planning is taking place, this must be a 501c4 expense.*
    - *501c3 and 501c4 funds can be used for non-mobilization hub building (recruitment, public education, general meetings, etc).*
- Public Education (Anything training or presentation related that does not relate to electoral or lobbying activity)
    - For instance, education about climate change and the Green New Deal.
    - ***NOTE: if seeking to hire a speaker/trainer/etc, you will need an invoice and W9 in place of a receipt***
- Sunrise Store Swag
- Leadership Development (Organizer trainings and conferences)
- Non-candidate-specific voter registration (reach out to Vianni with questions)

You may NOT spend money on:

- Personal or Private Benefits (All things unrelated to advancing Sunrise's mission)

- Contributions (both direct and in-kind) to campaigns, political parties, or PACs (both monetary and in-kind) at ANY level of government
- **Electoral Expenditures (for instance, buying social media ads/promoted posts supporting a candidate, printing out flyers supporting a candidate or political party)**
- Drugs or Alcohol
- Lobbying (Differing local laws, potential huge fines)
- Illegal activities (this includes materials that support arrestable activities)
- Additionally, cash withdrawals from the cards are prohibited.

NOTE: Mutual aid direct donations can be given with the 501c4 hub card only to other nonprofits. You will need a W9, invoice, and tax incorporation letter from the nonprofit you're donating to before making the donation. Contact Vianni via slack (@Vianni) or email (vianni@sunrisemovement.org) if you have any questions about this process.

Tracking & Reporting Expenses

Why does this matter?

We need to know where our money is going! As a nonprofit it's necessary for us to track every expense we make for a number of reasons, such as protecting our nonprofit status and making sure we're in compliance with all relevant laws. As a cardholder, it's your responsibility to help us track where the money the organization is providing through the Hub Finance System (HFS) is going.

Remember:

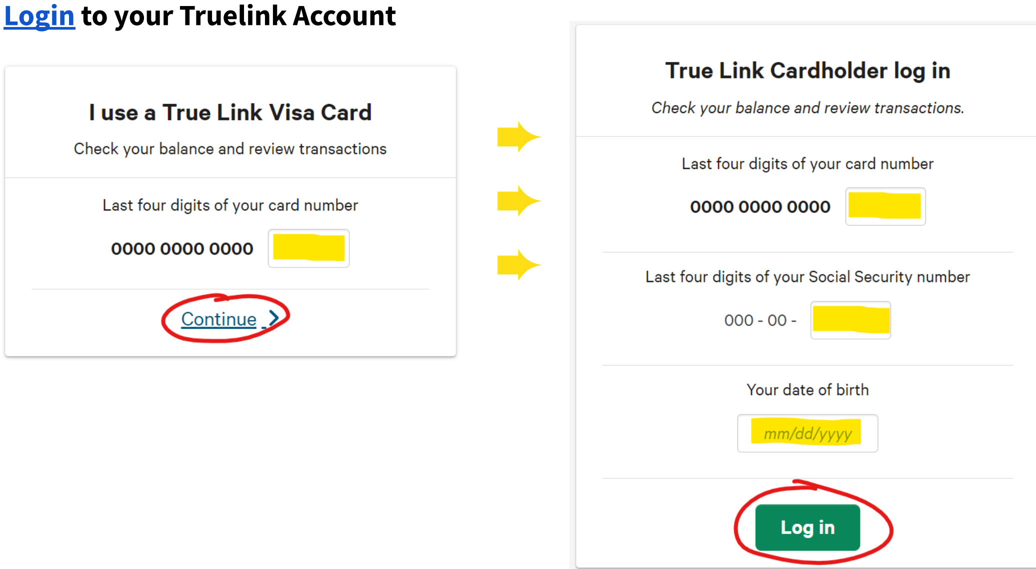
- **Expense reports are due on the 1st of the month**
- **You *ONLY* need to submit an expense report if you have made any expenses in the last month**
- **Keeping an organized folder in Google drive with all your finance tracking will make the submission process go faster**
- **If you fail to submit your expense report in a timely manner or are found to be in noncompliance (ie. missing/mismatched receipts or personal purchases), your account may be frozen and/or closed**

Content:

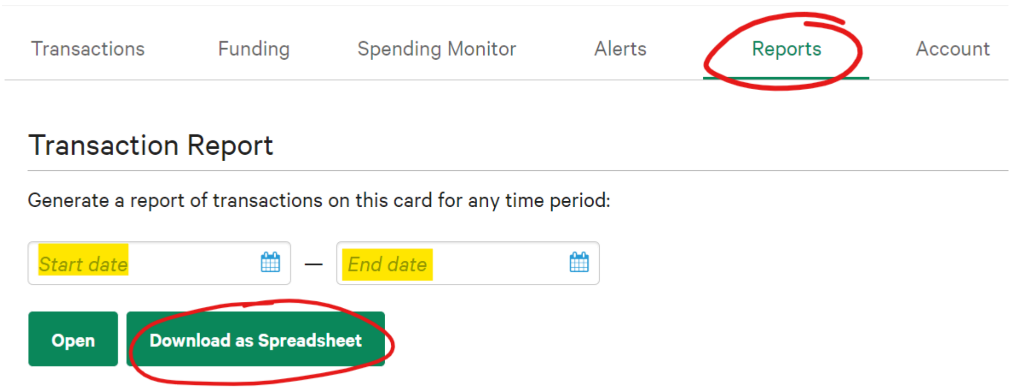
- Preparing Your Truelink Report
- Compiling Receipts
- Submitting Your Expense Report

Preparing Your Truelink Report

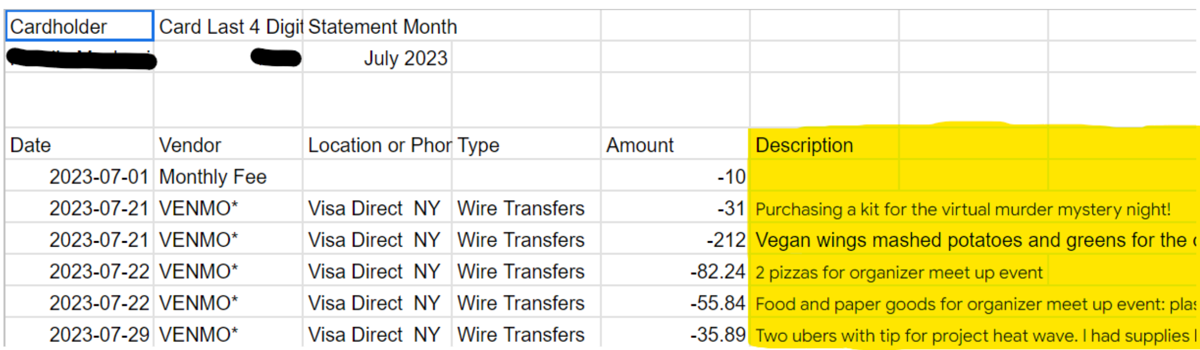
1. Login to your Truelink Account



2. **Go to the 'Reports' Tab. Insert the dates for the previous month and 'Download as Spreadsheet'**



3. **Open the .csv file in Google Sheets and add a 'Description' column.**



Cardholder	Card Last 4 Digit	Statement Month			
[redacted]	[redacted]	July 2023			
Date	Vendor	Location or Phor	Type	Amount	Description
2023-07-01	Monthly Fee			-10	
2023-07-21	VENMO*	Visa Direct NY	Wire Transfers	-31	Purchasing a kit for the virtual murder mystery night!
2023-07-21	VENMO*	Visa Direct NY	Wire Transfers	-212	Vegan wings mashed potatoes and greens for the
2023-07-22	VENMO*	Visa Direct NY	Wire Transfers	-82.24	2 pizzas for organizer meet up event
2023-07-22	VENMO*	Visa Direct NY	Wire Transfers	-55.84	Food and paper goods for organizer meet up event: plas
2023-07-29	VENMO*	Visa Direct NY	Wire Transfers	-35.89	Two ubers with tip for project heat wave. I had supplies l

Compiling Receipts

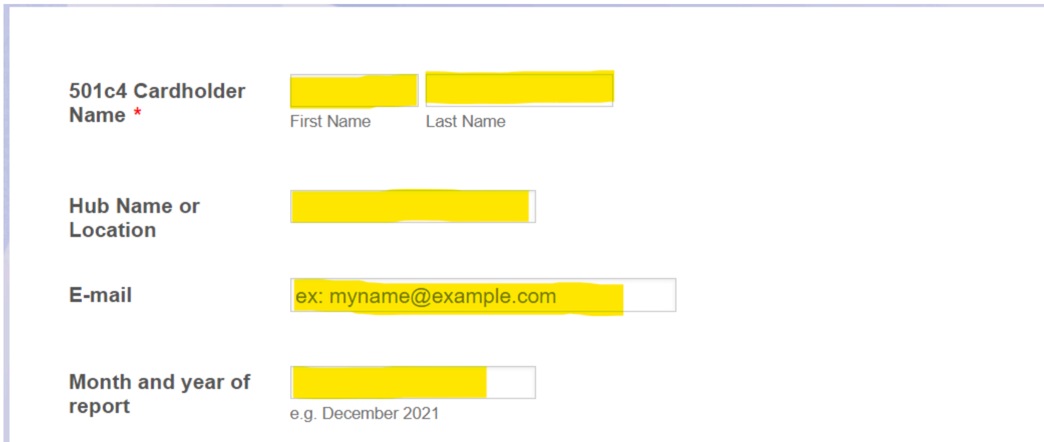
1. **Make sure you have all the receipts for the expenses on the Truelink report.** It's *especially* important that you have receipts for ALL Venmo/Paypal transactions.

2. **Merge the receipts into a single file in the order they appear in the expense report** (having them in order helps the staff compliance review go faster) **and download as a PDF.** Use the software/platform you prefer, but some options for merging PDFs are:
   - Adobe Acrobat Merge PDFs
   - iLovePDF
   - Instructions for merging PDFs in Google Drive

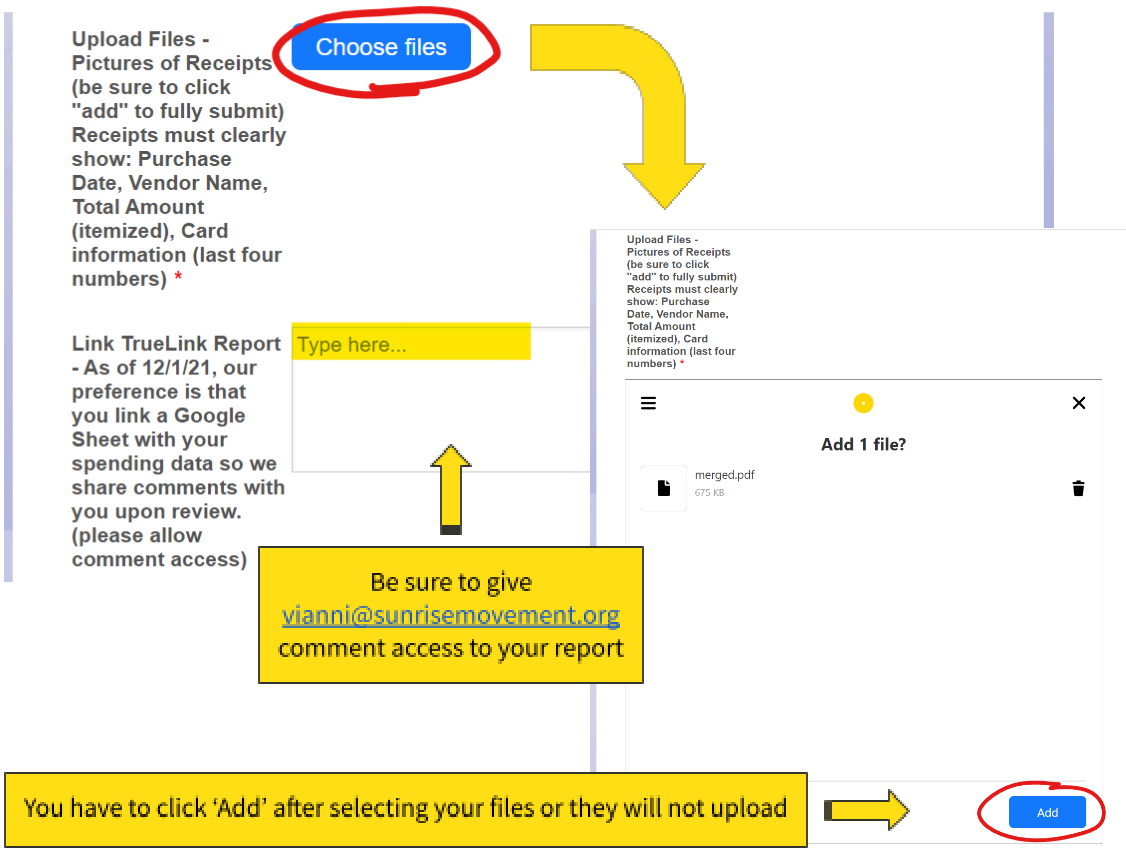
Submitting Your Expense Report

1. **Open the jotform link for the expense report you're submitting – C4 Jotform OR C3Jotform**

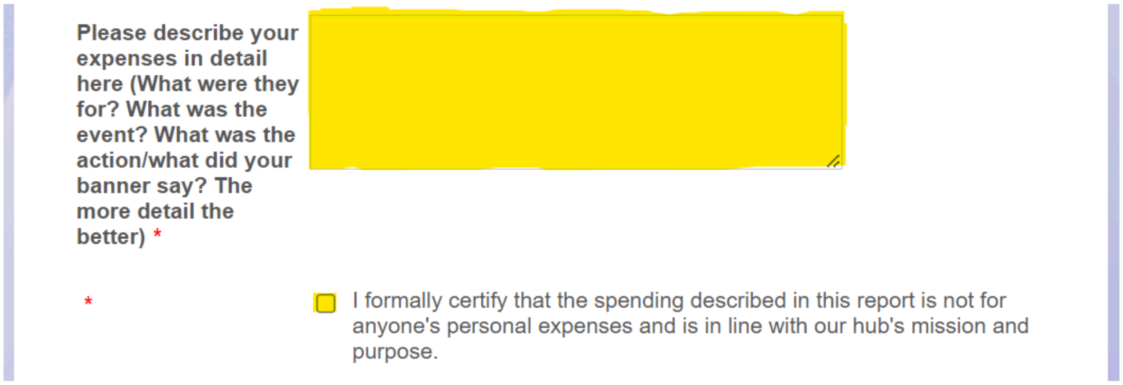
2. Fill out the basic information:



3. Upload the PDF of combined receipts and add the link to your truelink report with descriptions added.



4. **Describe what your expenses were for and certify your expenses are in compliance.** The more detail you can provide the better and it's helpful to note how this relates to Sunrise's mission.



5. **Submit your report and DONE :)** You should receive a confirmation at the email address you provided. *Be sure to do this process twice if you have expense on both your c4 and c3 cards in any given month.*

If you have any questions or comments about this guide please contact Vianni via slack (preferred) or via email (vianni@sunrisemovement.org).

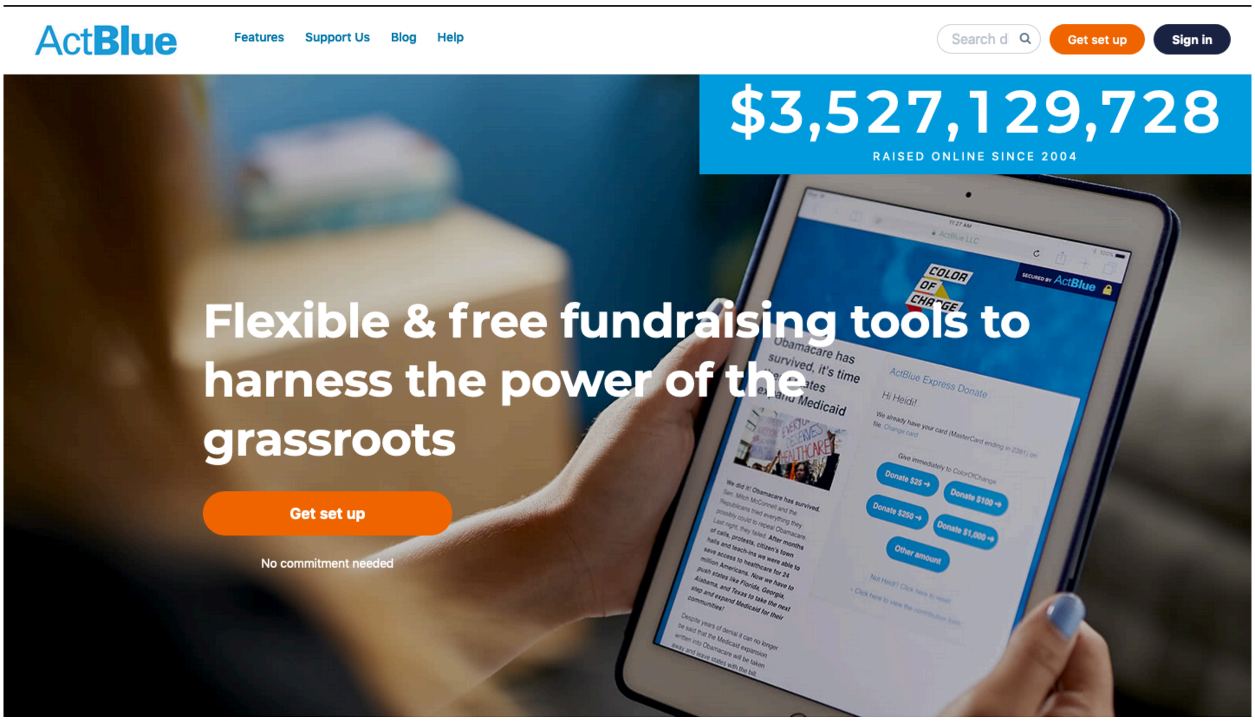
Disclaimer: *If a report is late, and one follow up message has been sent asking for the report, the given card will be frozen until the report comes in. If improper expenses are seen on a card, the card will be frozen or closed until the issue can be resolved, depending on the severity of the improper expense. Please review the spending guidelines (C4 Guide; C3 Guide)!*

Fundraising

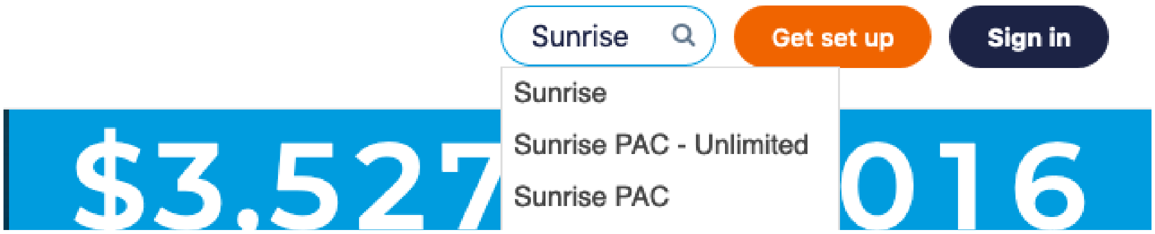
Setting Up & Using Your ActBlue

Setting up an Actblue Page

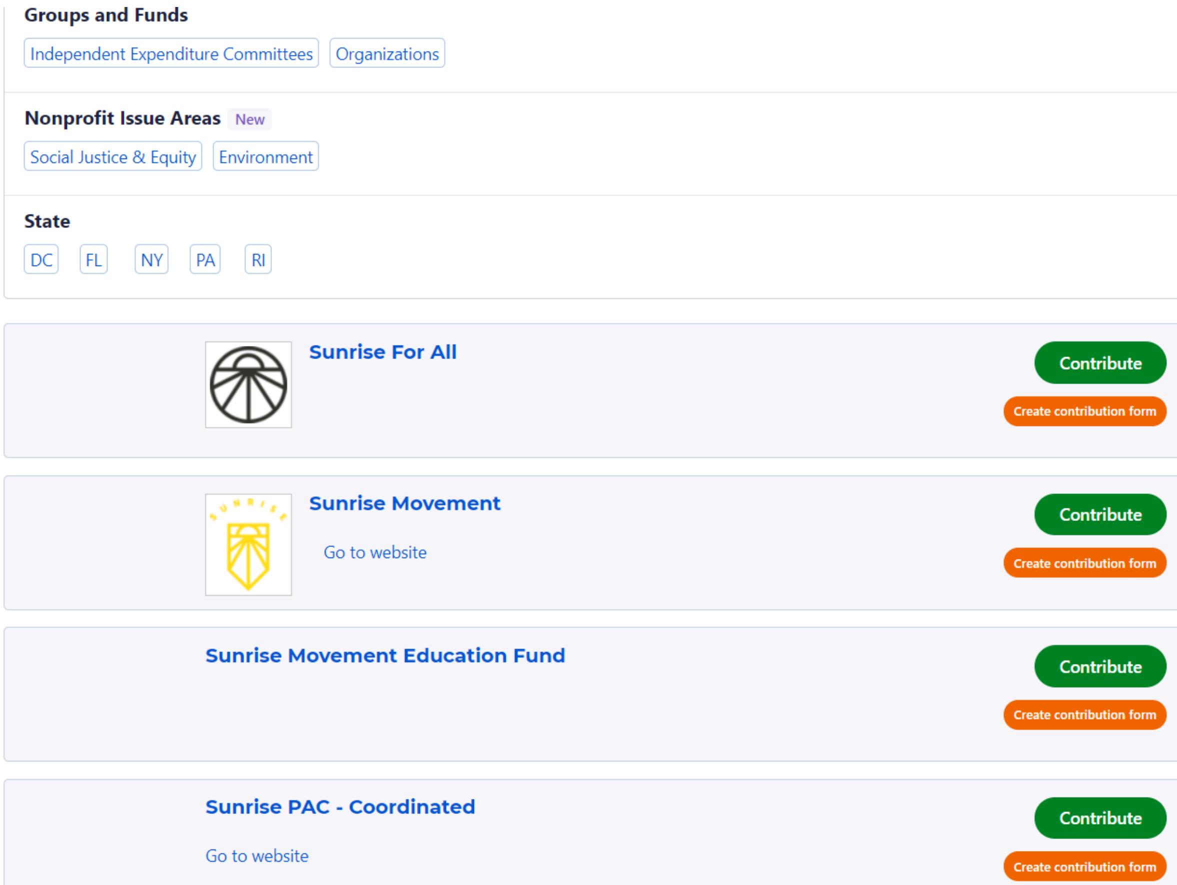
1. Go to www.actblue.com



2. At the top, find the search box and type "Sunrise Movement" - Do not select from the drop down list, but instead click "enter" on your keyboard.

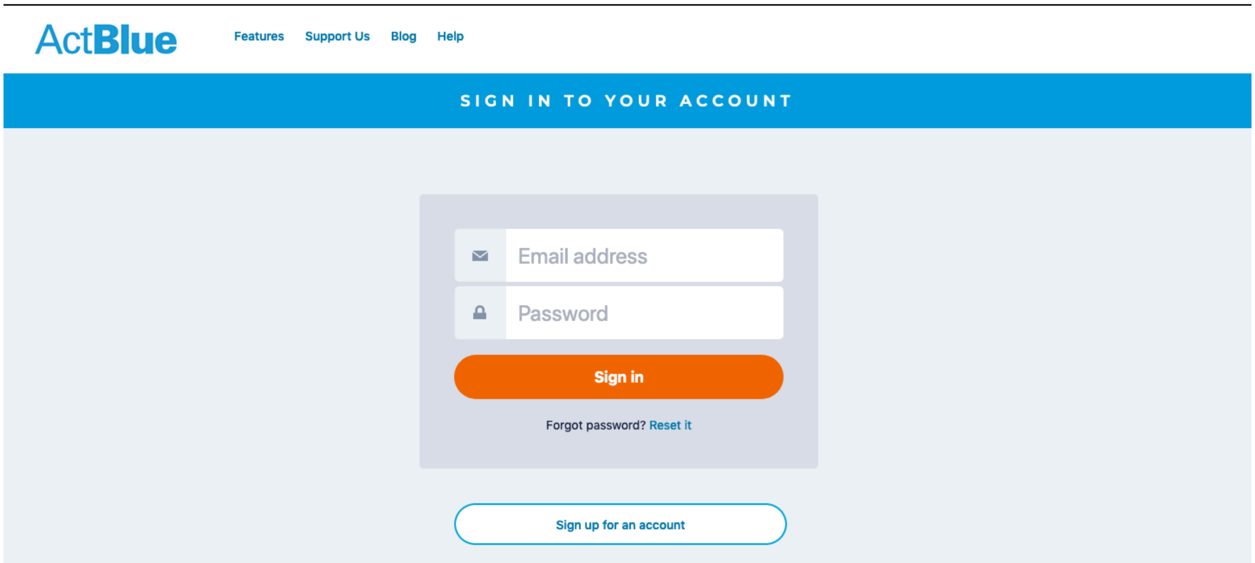


3. It should take you to a directory page that looks like below. Click the orange "Create contribution form" for "Sunrise Movement" with the yellow logo, NOT Sunrise PAC or Sunrise for All.



4. It will lead you to this sign-in page. If you do not have an account, click "Sign up for an account." If you already have an existing account, sign in. We recommend using the email of the general hub or long-term hub coordinator or treasurer to

ensure stability. If you already have an account with ActBlue, you can ignore this section.

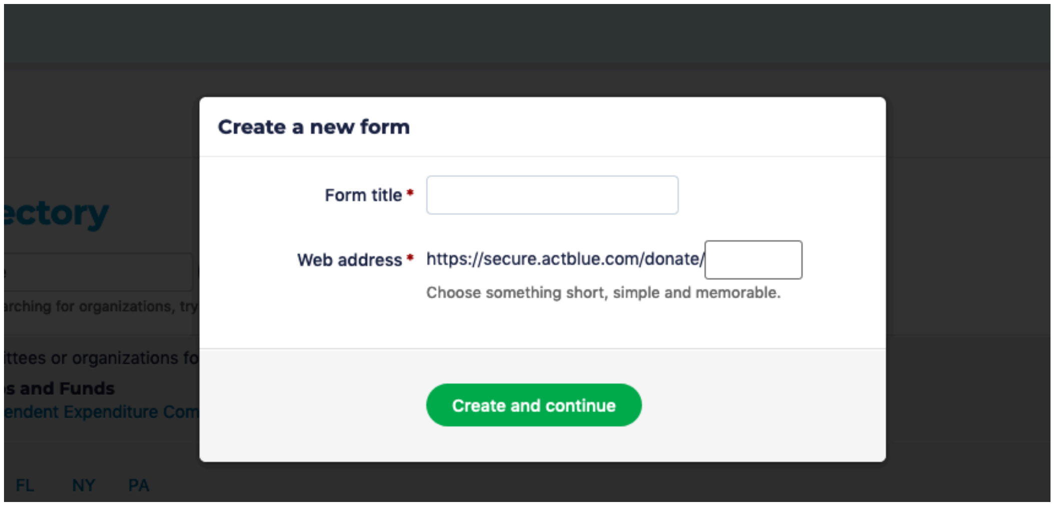


5. **If you have to make an account, it will take you away from the Sunrise page after completion. Go back and repeat steps 2, 3, and 4.**

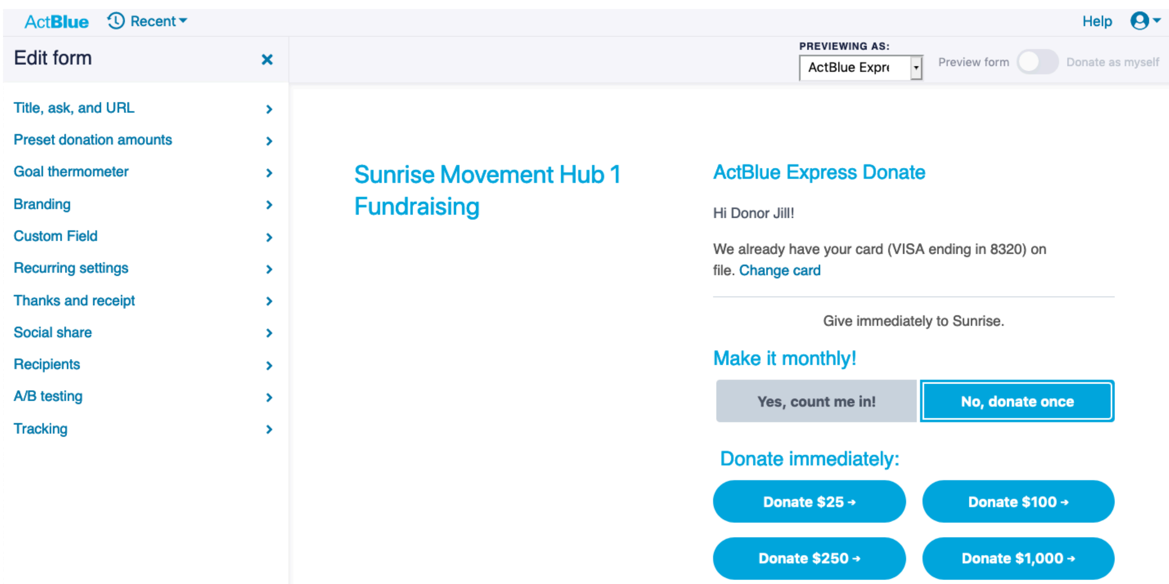
   Click the orange "Create contribution form."

   With the Form title, be creative! This is your hub's page and space. Be sure to include, however, "Sunrise" and the specific name of your hub (Ann Arbor, Boulder, etc.) somewhere within it. And as always, remember to be appropriate. With the Url, add your hub name at the end: https://secure.actblue.com/donate/Sunrise(hub name). Please do not use the general city but your specific hub name.

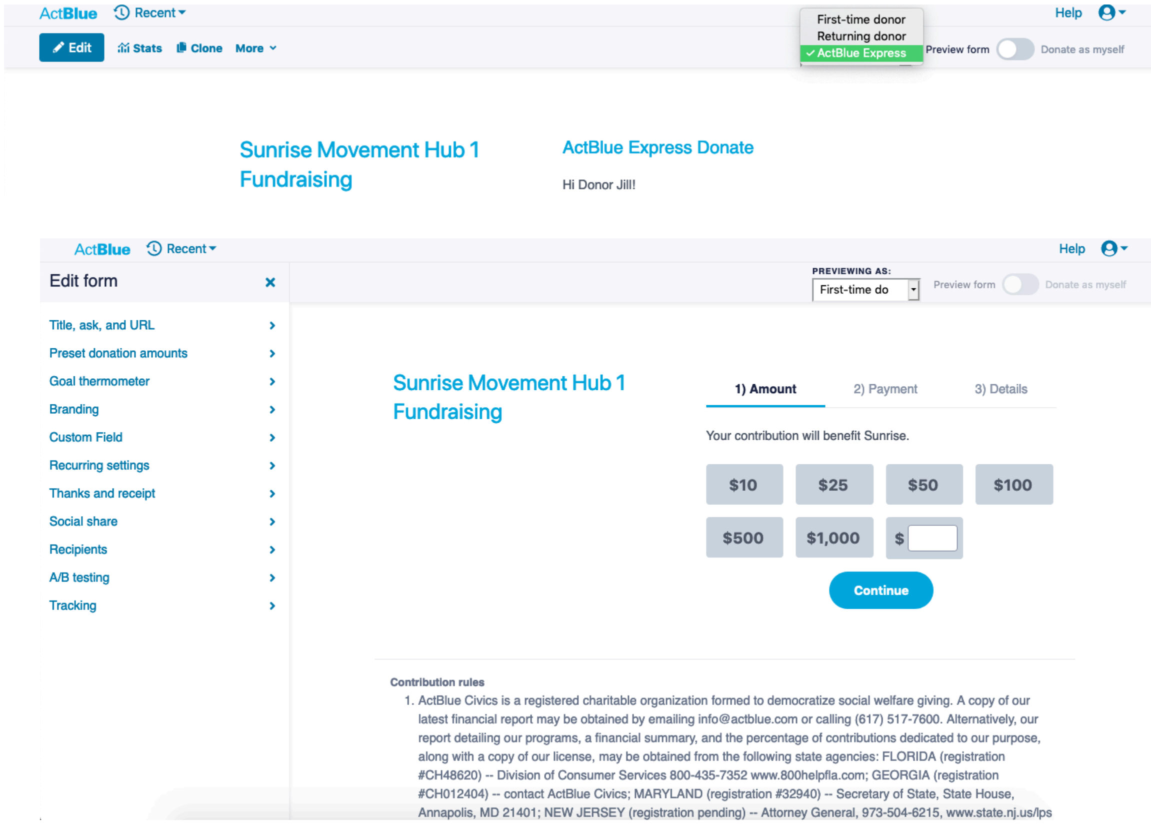
   Once you have done so, click the green create button.



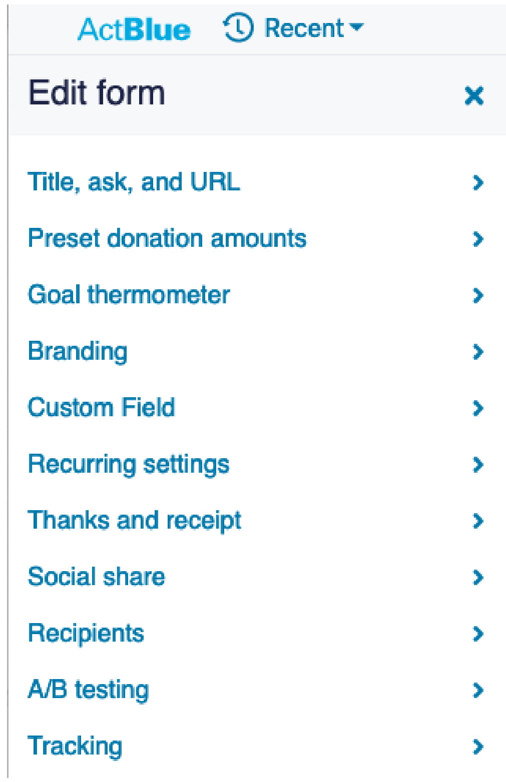
6. **You're at the landing page! This is where you can see the current appearance of your form and make appropriate edits. Much of it should already be set up, but much of it can also be changed and personalized.**



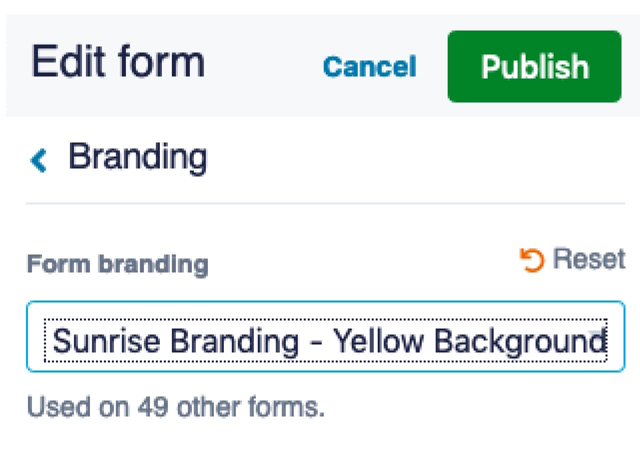
7. **First, we recommend, exiting the "ActBlue Express" view and entering the "First-time donor" or "Returning donor" view by clicking "ActBlue Express" on the top right-hand corner. A short-list should pop down, at which point you can click either "First-time donor" or "Returning donor."**

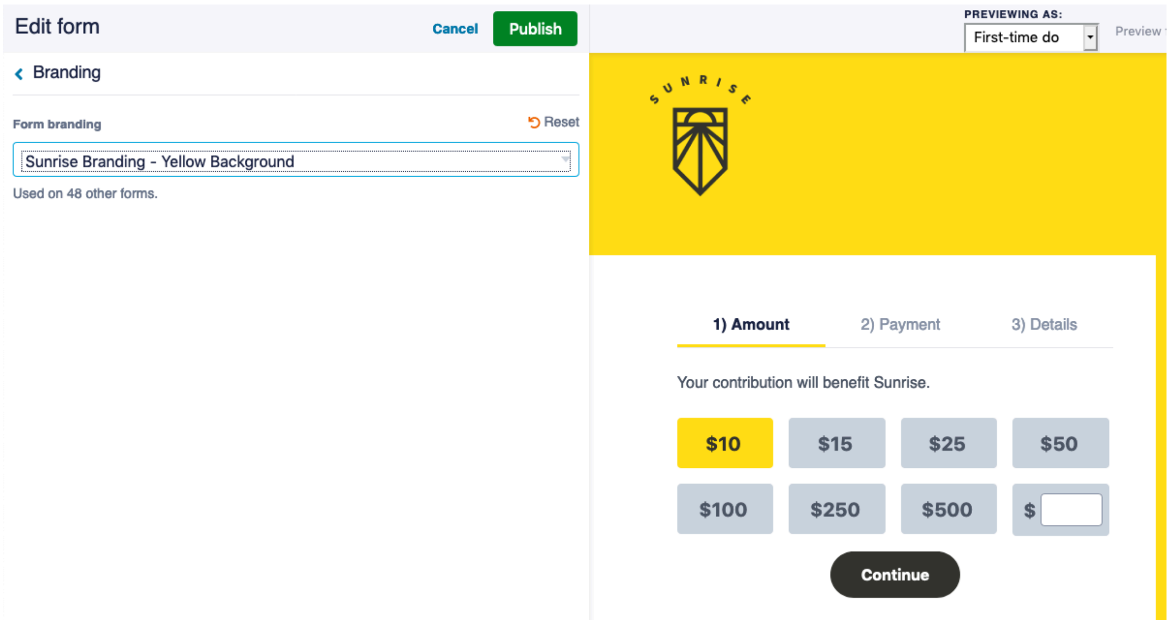


8. **There are many options for personalization, and much of those can be made within the "Edit form" section on the left side of the site. We will show a couple of the more common and likely ones you will change, but we recommend looking around and seeing the various options available.**



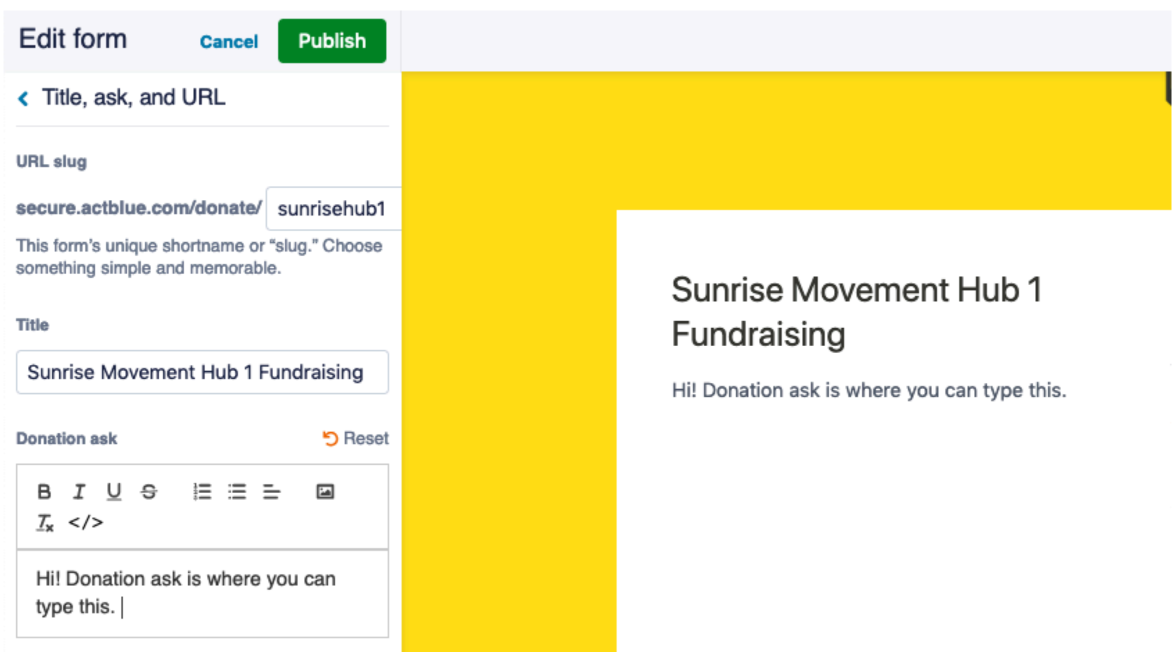
9. **Branding:** One of the most simple ways you can change your hub's landing page is to change the visual appearance of the site. Go to "Branding" under "Edit form" and click the drop-down option. For now, there is only one option: "Sunrise Branding - Yellow Background," but other options may be coming in the future.





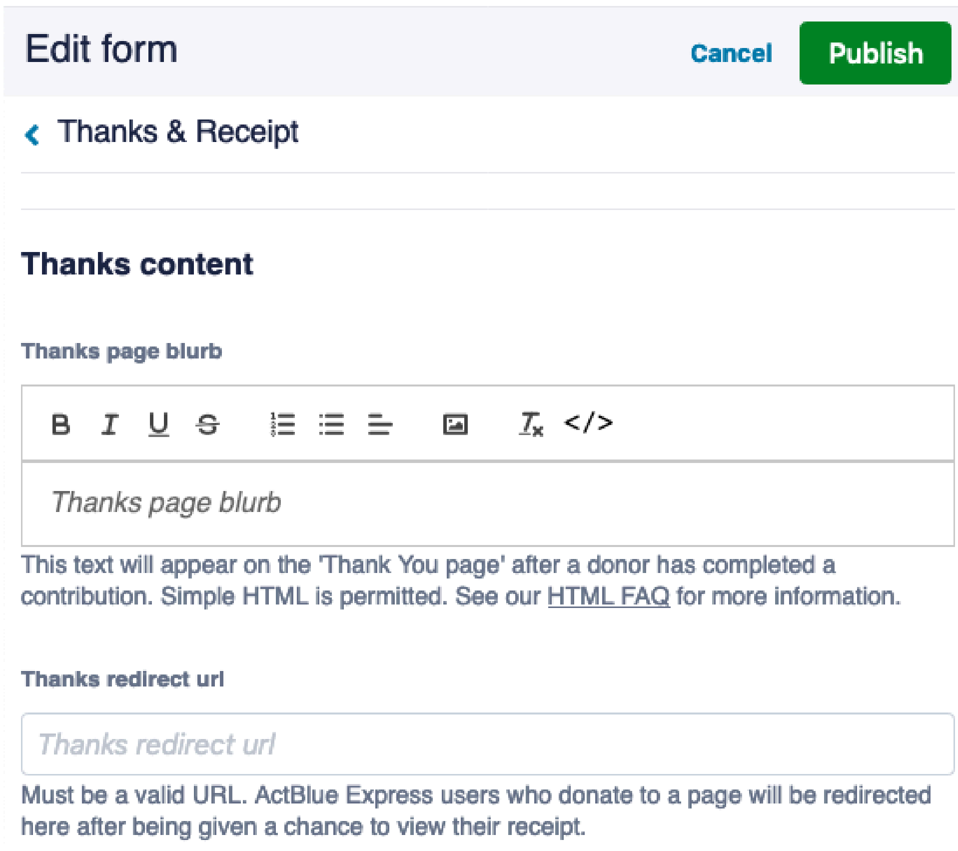
10. **Donation ask (empty section below the title):** You can make this your own by writing about your hub and this fundraising within the “Donation ask” section. This is under the “Title, ask, and URL” page. What you write within this section will appear within the initially empty section under the form title.

    You can also go back and change the Title of the form and the URL**.**

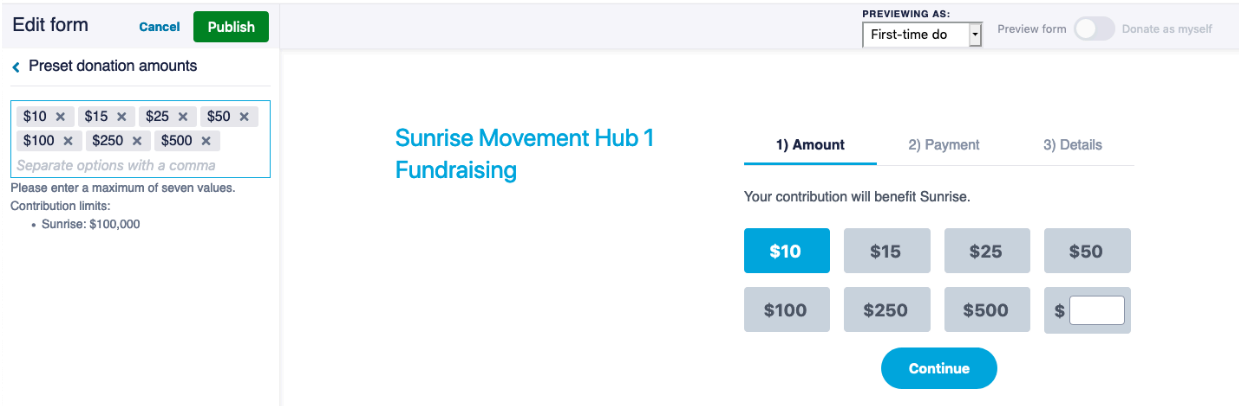


11. **Thank you content and redirect:** After someone makes a donation, you can send a personalized message and/or send them to [Sunrise's main site](). Under the "Thanks & Receipt" section, go to the "Thanks content." Here you will be able to write a personalized thank you letter/blurb which people will be able to see after they complete a contribution and before they exit the site. We highly recommend you have an appropriately long personalized thank you message.

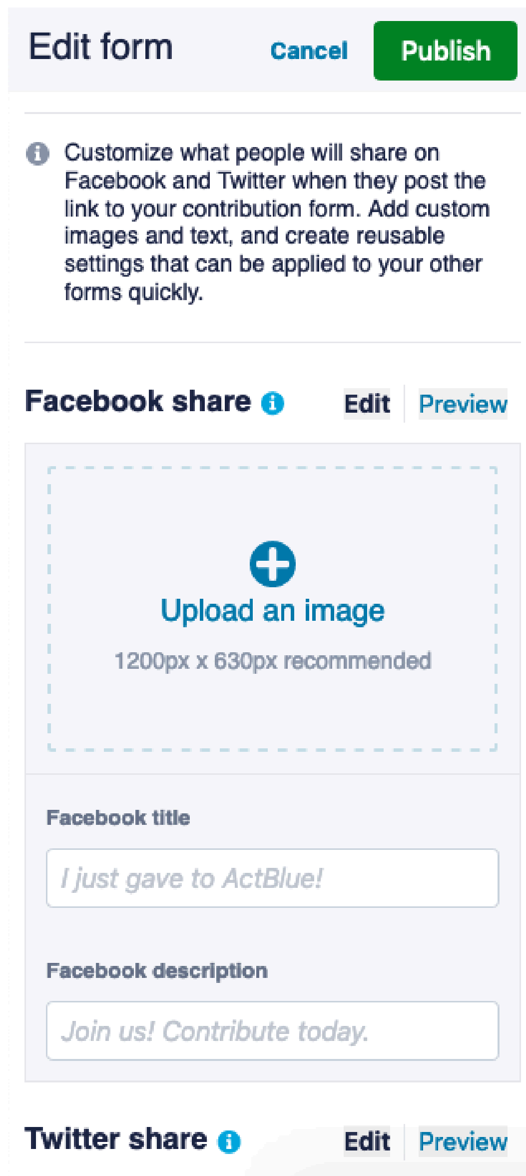
    The "thanks redirect url," if Sunrise's site is on it, will redirect people to Sunrise's main site after completing their contribution and viewing their receipt. Weighing the pros and cons of decisions such as this, hubs can make the decision they feel best.



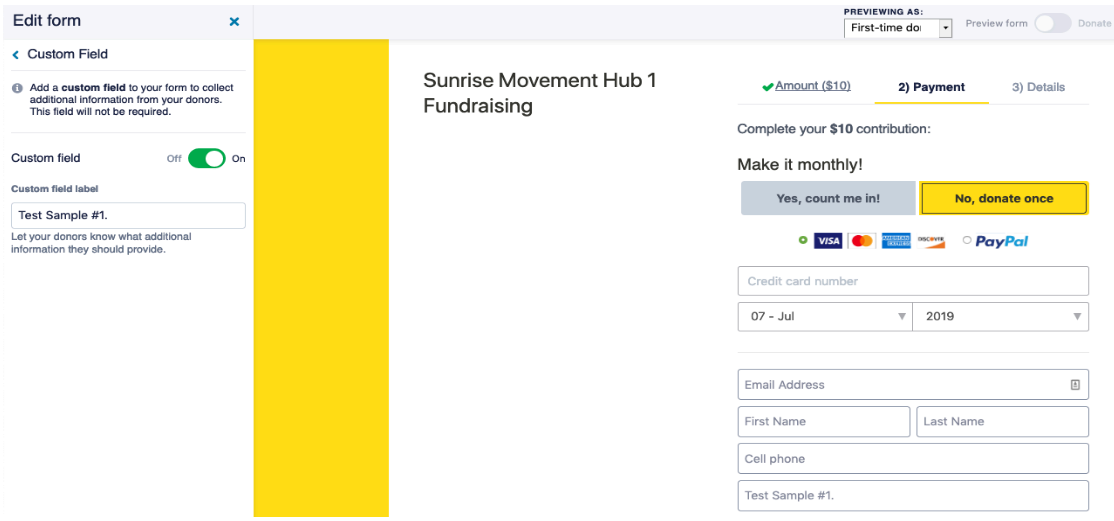
12. **Donation amounts:** You can also change the options of donation amounts that will show up for people by going to "Preset donation amounts." There, you can change the pre-existing options by typing your options within the given space. For example, having options of smaller amounts (ex. $10, 15) may be helpful.



13. **Social media sharing:** You have control over what appears when people share a link of your hub fundraising page on social media. You can suggest a preset image and a scripted description. As always, we recommend you first try with your personal social media before making things public.



14. **Custom field collection:** If left unchanged, the site will ask for the donor's email address, first and last name and cell phone number. If you would like to collect additional information from donors, you can go to "Custom Field."



15. **Click Publish. When you are done making edits, you must click the green "Publish button" or the changes will not save.**
16. **We recommend that someone at the hub run through the system to check for everything (possibly including social media, site redirect, etc.) by donating $1. Please also notify Vianni so that she can ensure that everything seems established and in order in the back end of the system.**

This was a brief walkthrough of ActBlue. There are many more changes and actions that can be taken with ActBlue, and we encourage you to explore them. If you have any questions, please reach out to Vianni via slack (@Vianni) or email (vianni@sunrisemovement.org)

Fundraising through Actblue

Be sure to share your ActBlue page with your community because "we grow our power by talking to our communities"and by organizing money, we organize people! This grassroots fundraising guide is a one-stop shop for all things fundraising and has information on strategy and guides to share your Actblue far and wide in your community.

Important reminder: **Any solicitation that the funds raised are not tax-deductible, according to the specific IRS requirements for 501(c)(4)s. Every solicitation of funds must include the following statement:**

"Contributions or gifts to Sunrise are not tax deductible as charitable contributions or as business expenses under IRC Section 162(e)."

The statement must either be the first sentence in a paragraph or itself constitutes a paragraph, and must be in at least the same size type as the primary message stated in the body of solicitation.

Actblue is not directly connected to your Truelink card so it will take a few weeks before raised funds are available in your account.

Membership Dues Redistribution

Every person in your hub should sign up to become a member of Sunrise: smvmt.org/membership

Any dues brought in by your hub will be redistributed as follows quarterly:

For more information about membership & dues please check out this guide. Metrics about dues money as well as member numbers & demographics can be found on this dashboard.

Hub Materials Project

The Hub Materials Project (HMP) is our internal grant system from which we provide national funds to your chapter or hub to do all the amazing organizing you do!

We provide up to $1500 ($500 C4; $1000 C3) every 6 months per chapter/hub for a total of up to $3000 ($1000 C4; $2000 C3) a year. The rounds for hub materials project are from January 1st – June 30th and July 1st – December 31st.

	January 1 – June 30	July 1 – December 30
C4	$500	$500
C3	$1000	$1000

**For more information about the process and link to apply check out the [HMP Explainer](). **

Other Funding

Occasionally hub finance leads inquire about Sunrise accepting grants on their hub's behalf because most grants require an EIN number in order to apply. Most grants once awarded, however, also have tracking and reporting requirements. At this time, **we don't have the capacity to accept a *majority* of grants on behalf of hubs**. If you happen to find a grant that does not have any tracking and reporting requirements, reach out to Vianni to discuss if we may be able to accept the funding on your behalf.

We're also interested in other creative fundraising ideas so if you have thoughts about something that is not covered in this guide, reach out to Vianni to see if we can make something happen!

Justice, Equity, and Anti-Oppression

"We cannot successfully address the climate crisis without addressing the ongoing effects of colonialism, slavery, white supremacy, and capitalism"

As a hub treasurer, you have a critical role to play in helping our movement achieve it's justice, equity, and anti-oppression (JEAO) goals. Money has historically been a powerful tool of oppression and injustice, and here, we have the opportunity to push back and use the financial tools of your hub to reflect our movement's priorities. Below are some principles to keep in mind in your work.

1. **Educate yourself** - Have you taken a JEAO training with Sunrise? Read more about Sunrise's JEAO alignments here.
2. **Pay attention to your hub and community** - who in your hub needs support? Do they have the same experience as you in their access and ability? What about in your community? Are there groups in your area that are in line with our movement's mission? Be sure to not sit on your funds - put them to use!
3. **Ask, don't assume -** Systemic oppression means that only those who are used to asking for financial support will do so. Be attentive to where support might be needed. Do you provide food at every meeting? Is a hub member driving a long distance to make hub meetings? Cover their transportation fees. Does someone need a phone to do their hub work? Buy one! The goal is to be on the lookout for ways to create equity of opportunity in your Sunrise work.
4. **Make it real** - being a hub treasurer means holding your hub's JEAO goals. Make it real - write it out, set priorities, establish a JEAO change team. Has your hub set up a JEAO project or fundraiser (consider an equity drive)? Thinking in this way is an integral part of your role.

JEAO Checklist

As treasurer, please work to check off at least 3 of the following boxes:

- ❏ Attended JEAO training with Sunrise National
- ❏ Reviewed your hub's leadership and representation and set up outreach plan to reflect JEAO priorities
- ❏ Set up JEAO change team or JEAO project within your hub
- ❏ Conducted survey about hub JEAO needs (transportation support, supplies, etc.)
- ❏ Donated hub funds to local community groups (JEAO principles for mutual aid)
- ❏ Built community connections with diverse local organizations
- ❏ Donated hub funds to a hub with less resources
- ❏ Ran equity-based fundraiser (incorporating JEAO into your fundraising)

Community & Support

In Sunrise you are never alone! You are part of a large national movement full of experienced young organizers who are excited to connect with you and give you the support and guidance you need to raise, manage, and spend your hubs resources strategically.

Community of Hub Treasurers & Coordinators

There is a network of hub treasurers managing their hub's finances that you can tap into for support, advice, and community!

The Hub Finance Slack Channel is the communications HQ for the hub finance volunteer team. This channel will be a community for hub treasurers and a place where hub treasurers can consult with one another and share lessons, wisdom and celebrations. This space is yours! Please make it a place for your community and home! Fill out this form if you need to be added to the national Sunrise Slack. Then, DM Vianni via slack (@Vianni) to get added to the Hub Finance channel.

Internal National Support

Support from Vianni, the national Movement Operations Lead, is available. You can hit her up on Slack (@Vianni) or email (vianni@sunrisemovement.org) with questions. If you need help with something that requires more than just a DM, Vianni can work with you to schedule some time for a 1:1.

We strongly encourage you to build community power and tap local fundraising. We also have a Dashboard of national resources available to you. Check it out!

External Support

These are external resources that may be helpful in helping you resolve specific issues.

Support from True Link

True Link can be contacted for problems with debit cards

P: 1-866-984-8576

E: support@truelinkfinancial.com

FAQs

Linking Venmo with cards

- **Sending money from Venmo**
  - Using Venmo can enable Hub Treasurers to easily reimburse hub members for various expenses. To link Venmo to your TrueLink card, first select your desired Venmo account, be it your personal account or an account established specifically for your hub (see note below if hoping to establish hub account). In either case, go to Settings>Payment Method>"add bank or card." Select "card" instead of "bank" and input the information of your TrueLink debit card. It's as easy as that. You can now send funds out of TrueLink via your Venmo account. *Make sure that all original receipts for reimbursed purchases are included in your monthly hub expense report!*
- **Receiving hub donations with Venmo**
  - Establishing a means of accepting incoming donations with Venmo is more challenging than sending donations out of the account. First, Venmo is not compatible with the bank Sunrise uses, so it can not be linked directly to the TrueLink account via the Venmo "add bank" feature. Second, to establish a hub Venmo account, you must have an open/unused phone number. This is often not the case as many to most hub members will have their personal Venmo account. With all of that in mind, the best way to accept incoming Venmo donations is to treat them like cash - accepting the donation to the Venmo account, and making a contribution to the hub ActBlue page of an identical amount.

Linking cards to PayPal

- Read this guide.

What to do about check and cash donations

- Receiving checks and cash is very common. Cash should simply be deposited into the hub coordinator/treasurer's account and that person should then make a contribution of the same amount into the hub ActBlue. Checks are a bit more complex, regarding if they are made out to the C3 (Sunrise Movement Education Fund) or the C4 (Sunrise Movement). In either case they should be sent to 712 H St NE Unit #626, Washington, DC 20002

National Reimbursement Process

- If you need to be reimbursed for a National expense or need National to process a reimbursement for you, please fill out this form: https://form.jotform.com/92686144317159

What if I need to change the cardholder in my hub?

- Simply have the new cardholder fill out the application! Vianni will transfer the funds to the new card, and close the existing one as soon as the new cardholder confirms that their card has arrived and has been activated.

More questions are answered in the Hub Finance FAQs: smvmt.org/hfs-faq